OLAPCharts for SharePoint 2010

User manual

© 2011, All rights reserved

www.kyubit.com

Contents

1. Installation and configuration 3
1.1. Kyubit OLAPCharts installation prerequisites 3
1.2. Kyubit Setup application 3
2. Using OLAPCharts web part 4
2.1. Provide valid OLAP connection 5
2.2. Start analysis / create OLAP Chart 5
3. Analysis techniques (features) 7
3.1. Set measure for OLAP chart 7
3.2. Set category axis for OLAP chart 7
3.3. Set series axis for OLAP chart 8
3.4. Set filters 8
3.5. Isolate members 9
3.6. Sorting 9
3.7. Show only first (x) members 10
3.8. Drill down and up 11
3.9. Drill by 12
3.10. Drillthrough 13
4. Chart visual appearance 14
5. Preview, save and continue analysis 15
5.1. Preview on the page 15
5.2. Save analysis 15
5.3. Continue Analysis 16
6. FAQ 17

© 2011 www.kyubit.com, All rights reserved. Errors and omissions expected

1. Installation and configuration

1.1. Kyubit OLAPCharts installation prerequisites

Kyubit OLAPCharts for SharePoint is standalone SharePoint solution that consist primary of a web part designed for implementation in SharePoint 2010 environment.

Server side prerequisites:

- SharePoint 2010 (Foundation or Server)
- ADOMD (Should be there already with SharePoint 2010 installation. If not, could be installed within setup)
- MSCharts (Should be there already with SharePoint 2010 installation. If not, could be installed within setup)

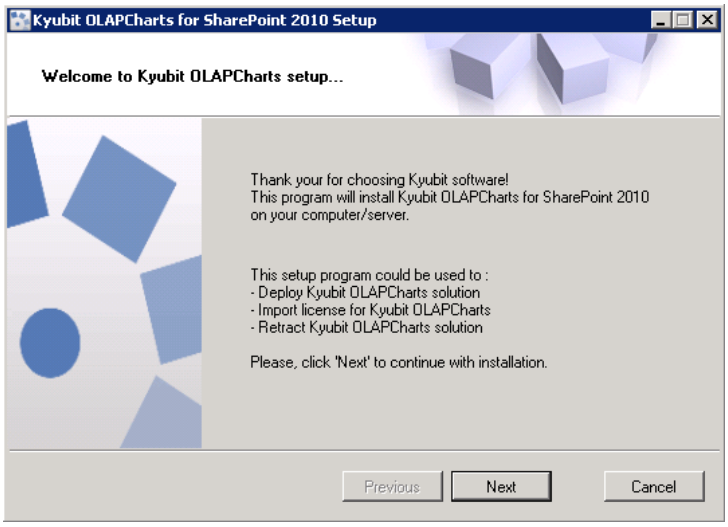
Client side prerequisites:

- Internet Explorer 7 or higher

1.2. Kyubit Setup application

OLAPCharts for SharePoint is deployed as standard SharePoint solution (wsp) with additional actions to modify desired SharePoint application web.config file. To make whole setup process very simple, Kyubit provides setup application that would perform all necessary installation job in few clicks.

KyubitOLAPCharts.wsp could be deployed manually using STSADM.exe. In that case, some additional manual changes to SharePoint application web.config should be made. To provide you correct web.config parameters, write to support@kyubit.com if for any reason you wish to deploy solution manually.


Kyubit OLAPCharts for SharePoint 2010 Setup
Welcome to Kyubit OLAPCharts setup...
Thank your for choosing Kyubit software!
This program will install Kyubit OLAPCharts for SharePoint 2010 on your computer/server.
This setup program could be used to :
- Deploy Kyubit OLAPCharts solution
- Import license for Kyubit OLAPCharts
- Retract Kyubit OLAPCharts solution
Please, click 'Next' to continue with installation.
Previous
Next
Cancel

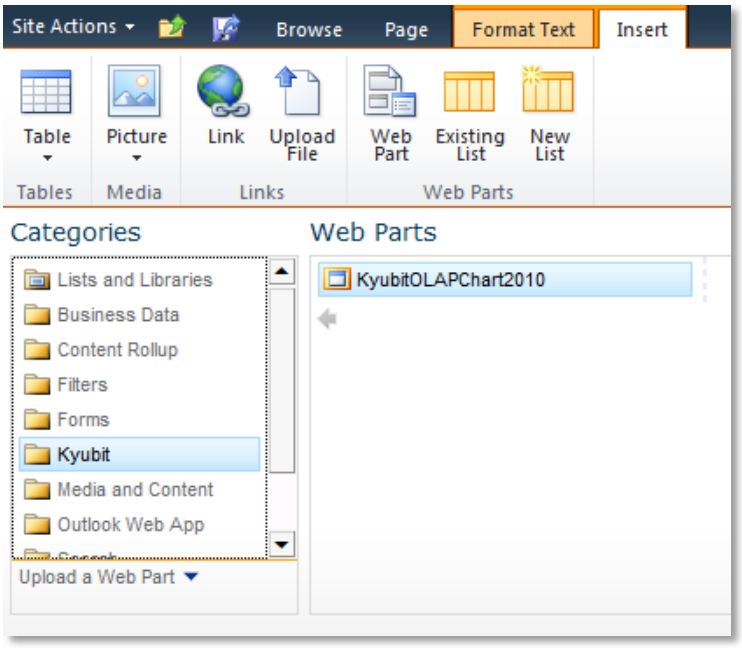
After you select desired SharePoint Site Collection setup will first check OLAPCharts setup status. OLAPCharts is solution that is globally deployed to SharePoint, but activated as a feature only on to desired SharePoint site collection. Setup program is also designed to retract solution from SharePoint.

Another feature of setup application is to register license key, when full version is purchased and license file obtained. Select Site Collection and click 'Import License'.

© 2011 www.kyubit.com, All rights reserved. Errors and omissions expected

2. Using OLAPCharts web part

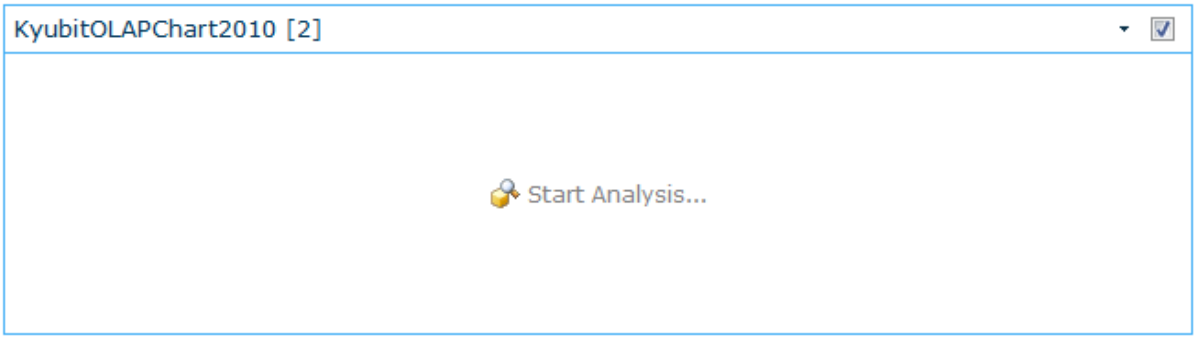
After solution is successfully deployed to SharePoint, “KyubitOLAPChart2010” web part is available on web parts gallery, located in “Kyubit” web part category. To use functionalities of OLAPCharts for SharePoint, add web part “KyubitOLAPChart2010” to any web part zone on your SharePoint page.



After you add web part to the page, edit web part height to desired size. Web part width will be automatically adjusted to available width, but its height is set manually. After you set height and perhaps web part name on the page, you can close web part design mode, because all other changes to OLAPCharts web part is done directly from OLAPChart Analysis view.

To save your OLAP chart analysis work, just click “Save” while in analysis view. All changes to web part will be saved without need to go to web part design mode. This special functionality is designed to perform fast and user friendly analysis and other changes to OLAPCharts web part.

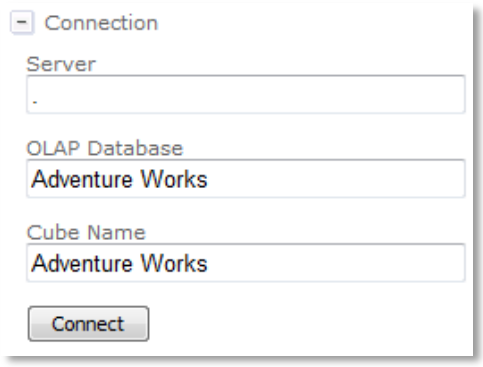
When you add web part to the page, only option “Start Analysis” is visible, which is starting point for setting up OLAP chart and OLAP analysis.



© 2011 www.kyubit.com, All rights reserved. Errors and omissions expected

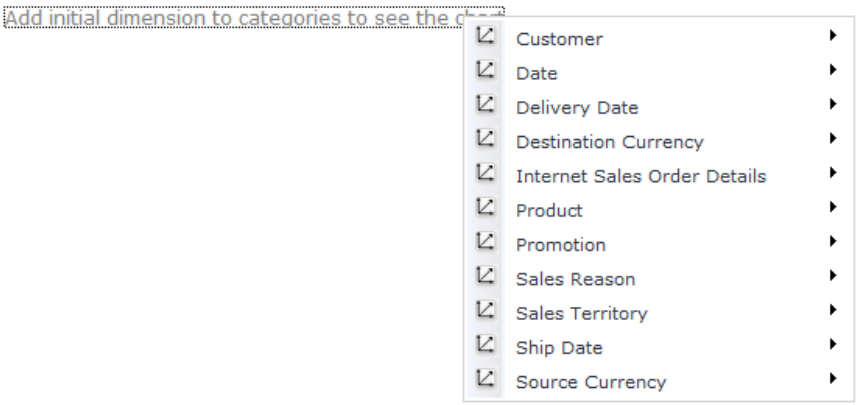
2.1. Provide valid OLAP connection

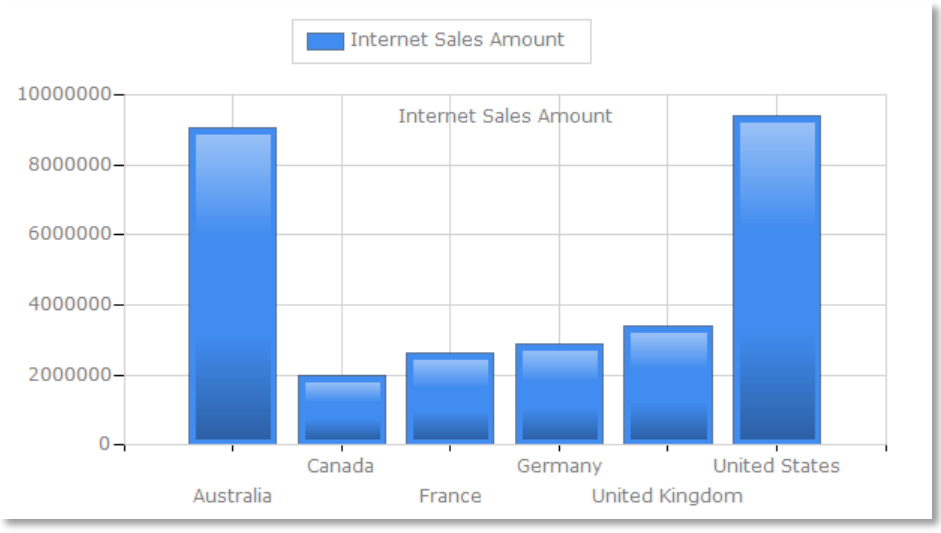
To get any data from OLAP cube, first provide valid OLAP connection in Analysis view “Connection” tab. Provide Server name, OLAP Database name and OLAP Cube name. If connection data is valid, message will appear that connection was successful. Automatically, in the middle of analysis view, option will appear, “Add initial dimension to see OLAP data”.



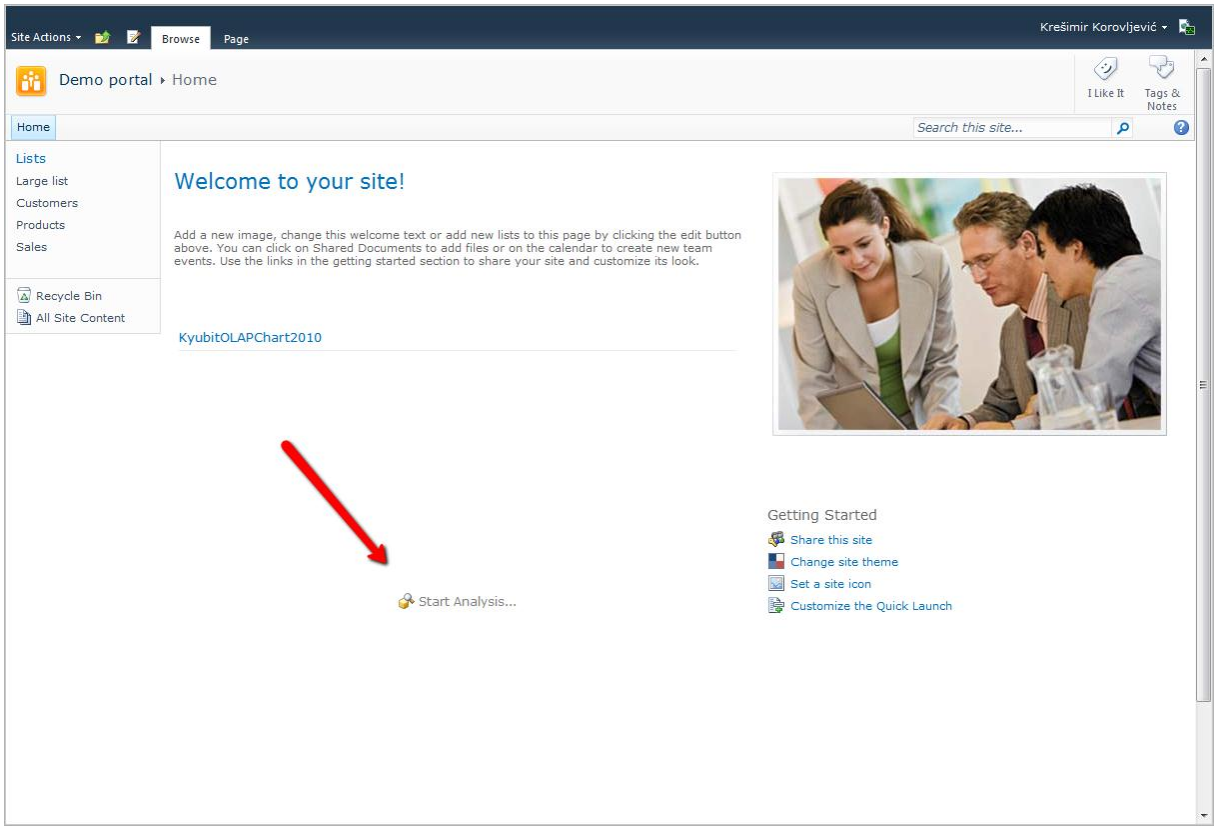
2.2. Start analysis / create OLAP Chart

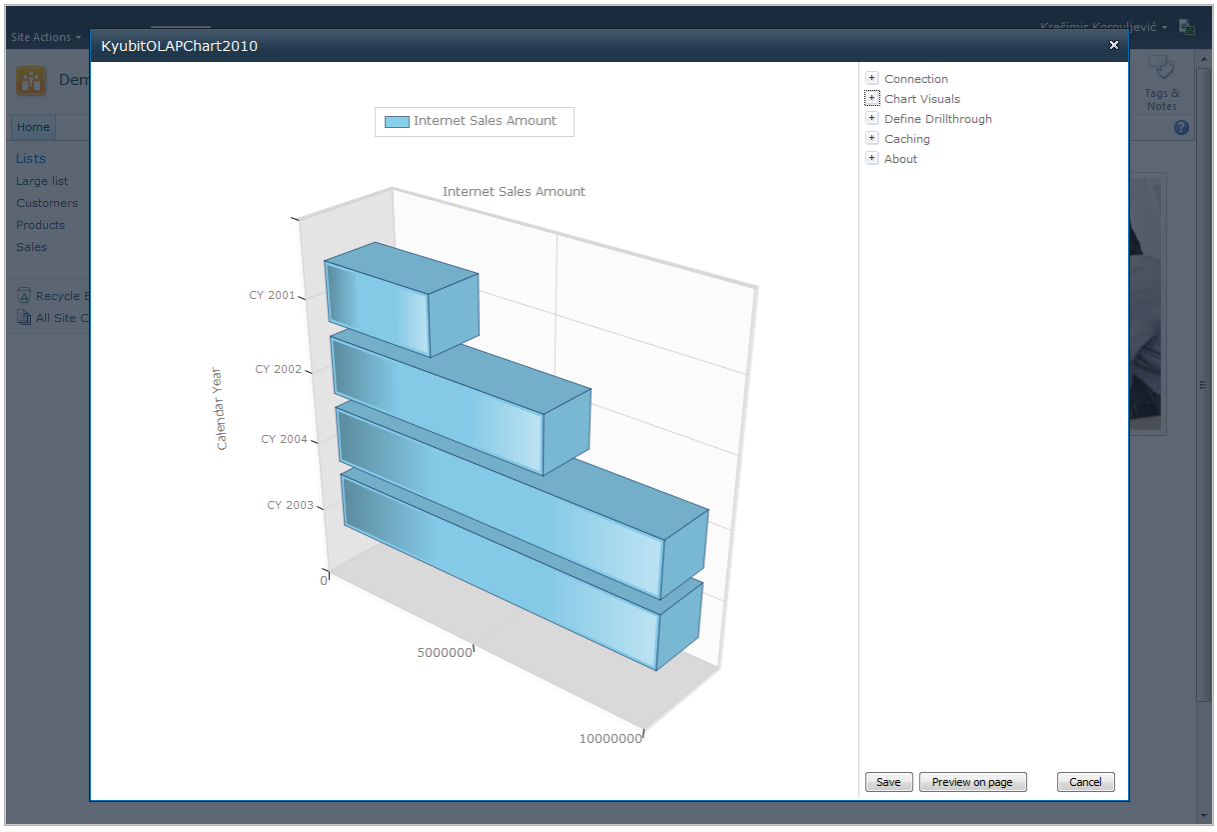
To see data in OLAP Chart, chart category has to be set. After you select OLAP dimension level for chart categories, chart will be drawn.





© 2011 www.kyubit.com, All rights reserved. Errors and omissions expected


Site Actions
Browse
Page
Krešimir Korovljević
Demo portal ▸ Home
I Like It
Tags & Notes
Home
Search this site...
Lists
Large list
Customers
Products
Sales
Recycle Bin
All Site Content
Welcome to your site!
Add a new image, change this welcome text or add new lists to this page by clicking the edit button above. You can click on Shared Documents to add files or on the calendar to create new team events. Use the links in the getting started section to share your site and customize its look.
KyubitOLAPChart2010
Start Analysis...
Getting Started
Share this site
Change site theme
Set a site icon
Customize the Quick Launch



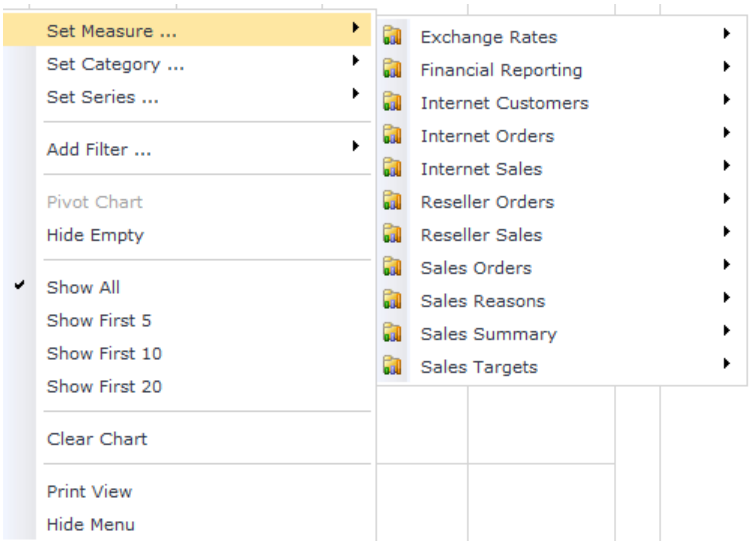
© 2011 www.kyubit.com, All rights reserved. Errors and omissions expected

3. Analysis techniques (features)

To perform analysis of OLAP cube data and visually present results in OLAPCharts web part, users can combine following techniques:

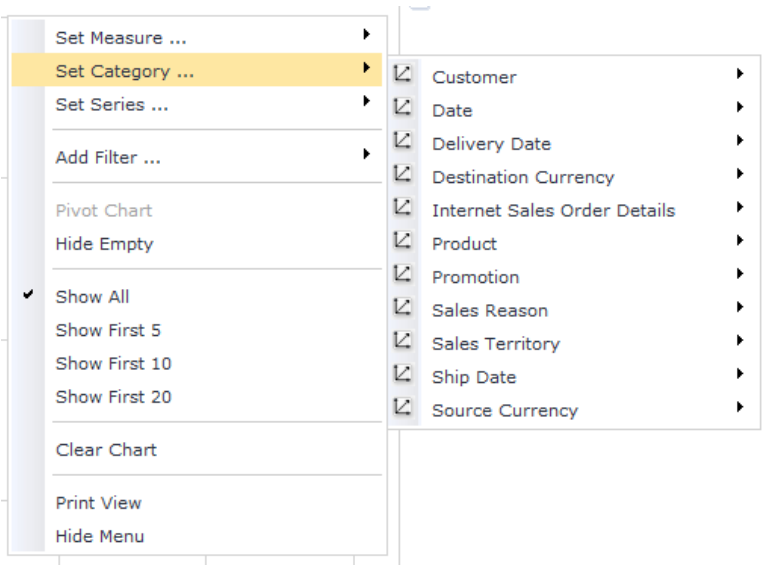
3.1. Set measure for OLAP chart

Initially, first measure in the cube will be used to show data. At any time, user can choose other measure to be used for analysis and charting. All Measures are grouped in folders, following measure-groups structure within cube metadata. On a single OLAP chart, only one measure could be used for analysis and visualization. Combining several OLAPCharts web part, user can integrate look on more than one analysis with different measures on a single page.



3.2. Set category axis for OLAP chart

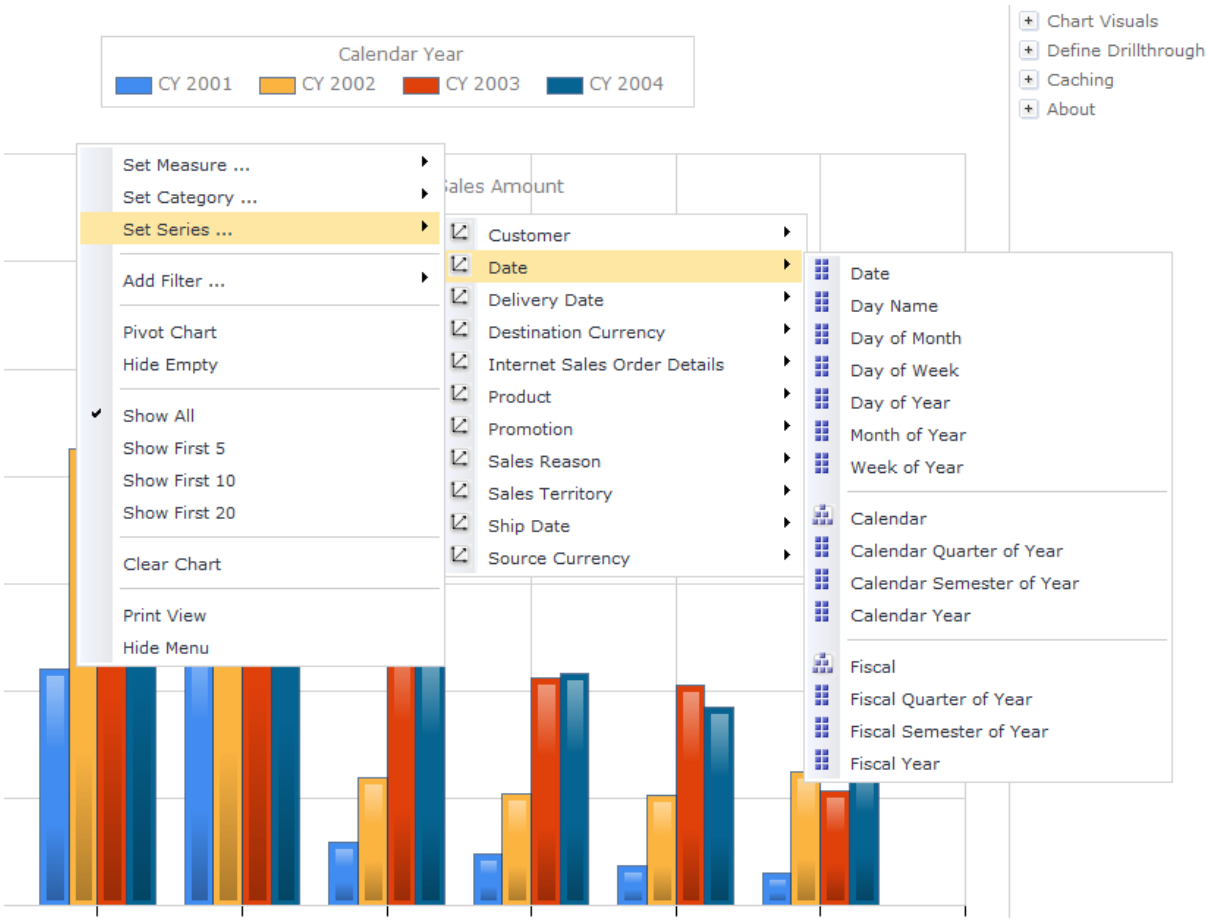
To start with analysis and visualization user must select certain dimension level for the chart category axis. At any time, user can change dimension level for category axis to perform desired analysis and get insight in desired data. Category axis is showing selected dimension level amount division/distribution within selected measure.



© 2011 www.kyubit.com, All rights reserved. Errors and omissions expected

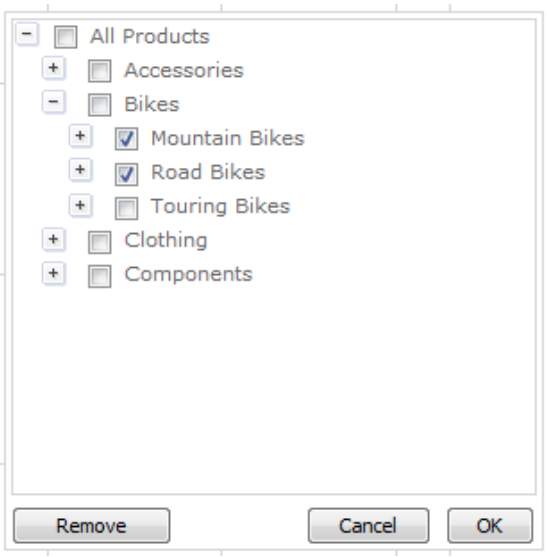
3.3. Set series axis for OLAP chart

Optionally and at any time, certain cube dimension level could be set for series axis in OLAP chart. Also, series axis could be removed at any time. Series axis represents additional amount division/distribution within category axis dimension hierarchy amount division/distribution for the chart selected measure.



3.4. Set filters

To show values filtered for certain dimension level members, user can select one or more dimension hierarchies for filters. Within selected filter dimension level, user can select desired members which would be used to actually filter (slice) analysis data.



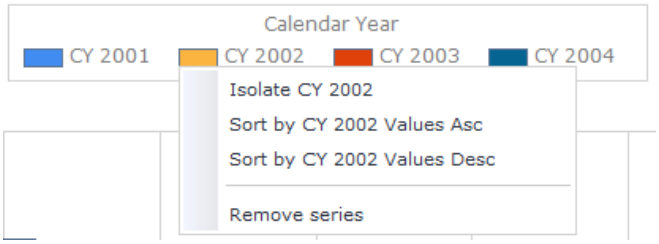
© 2011 www.kyubit.com, All rights reserved. Errors and omissions expected

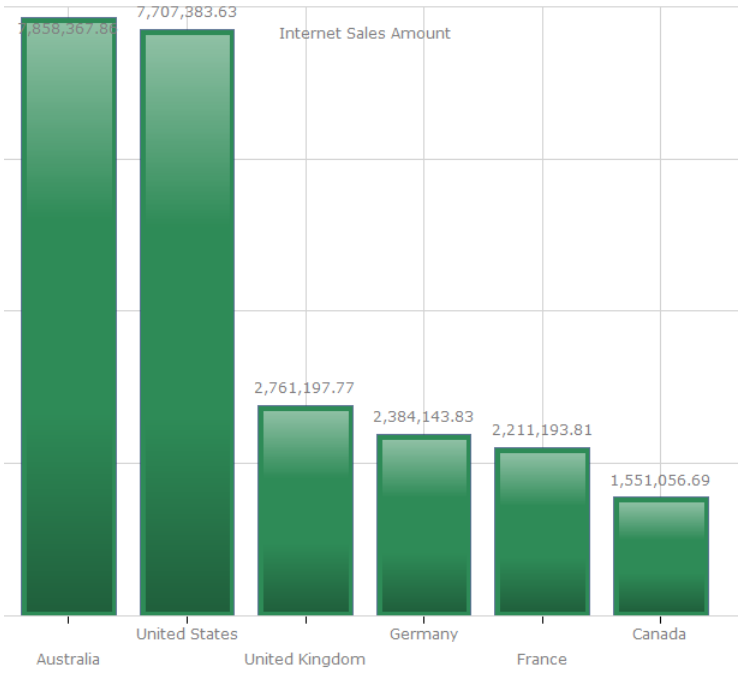
3.5. Isolate members

Alternative way to set filter members is to select them by directly (visually) from the chart elements (clicking on a chart bar for example). Selected (Isolated) dimension level member will be placed to filters and analysis data will be sliced using selected member.

3.6. Sorting

Chart categories and series could be sorted in ascending or descending order. To select sorting action, click on the legend (series or measure) and select preferred sorting.

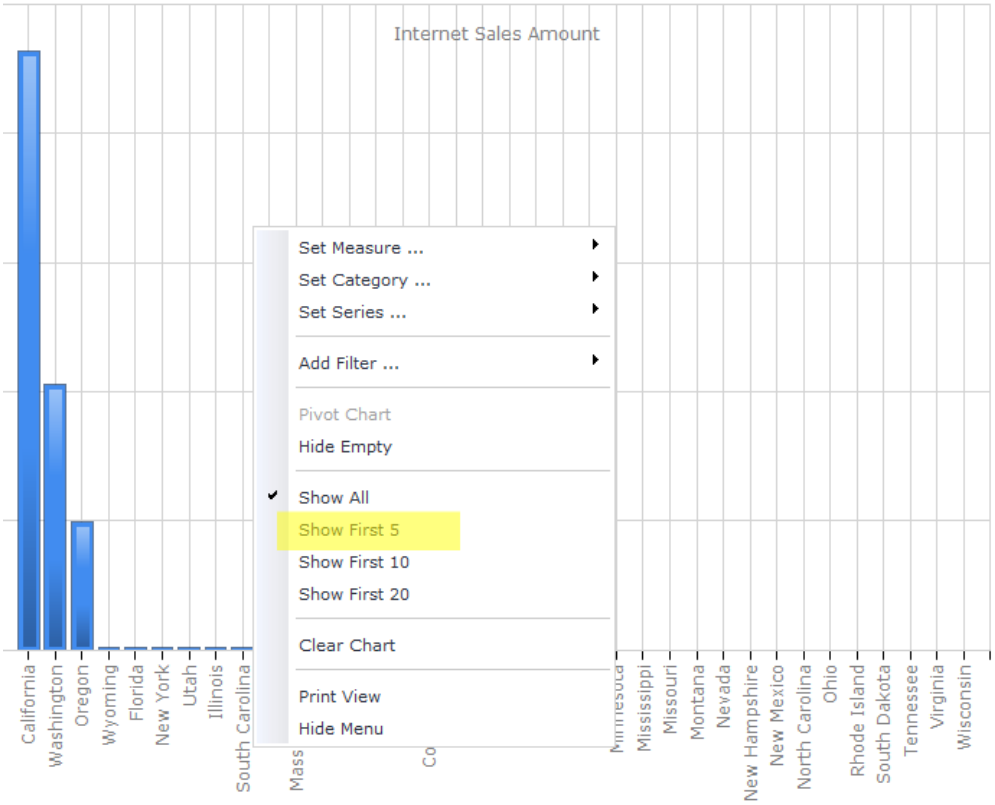




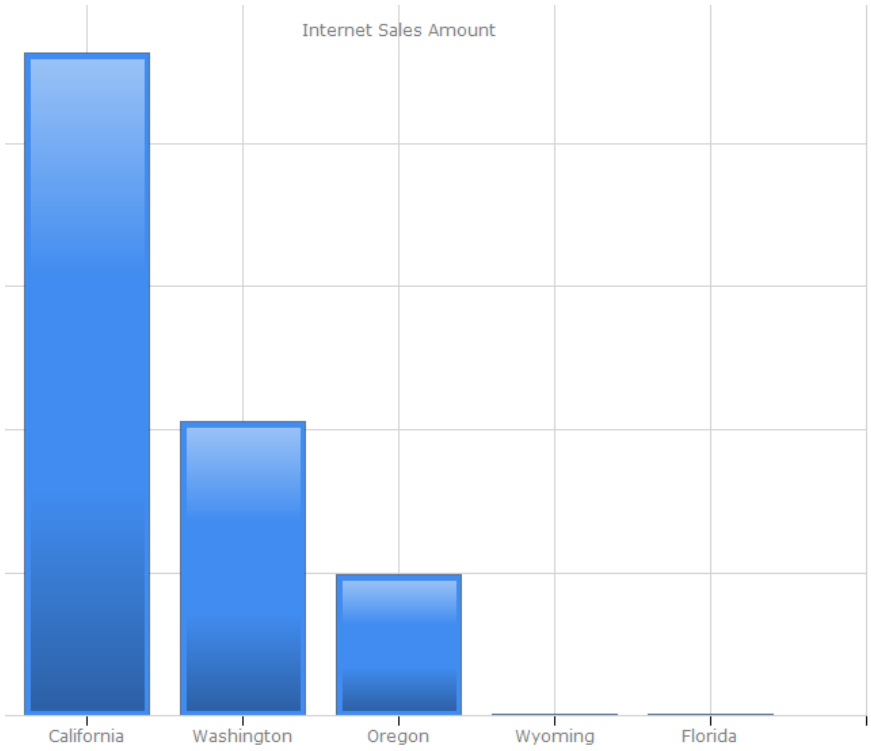
© 2011 www.kyubit.com, All rights reserved. Errors and omissions expected

3.7. Show only first (x) members

All category members or only first 5, 10 or 20 members could be shown for defined analysis, to be more focused on interesting details of analysis.



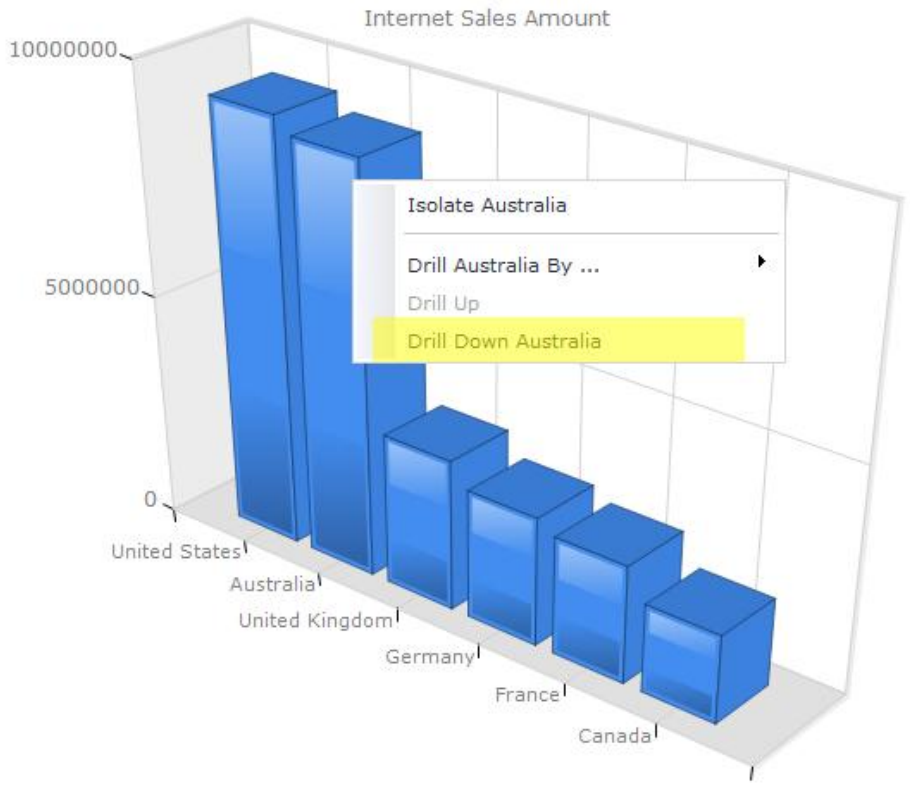
Set OLAP chart to show only first 5 members. Which 5 members would be first in the view is relative to currently applied sorting.

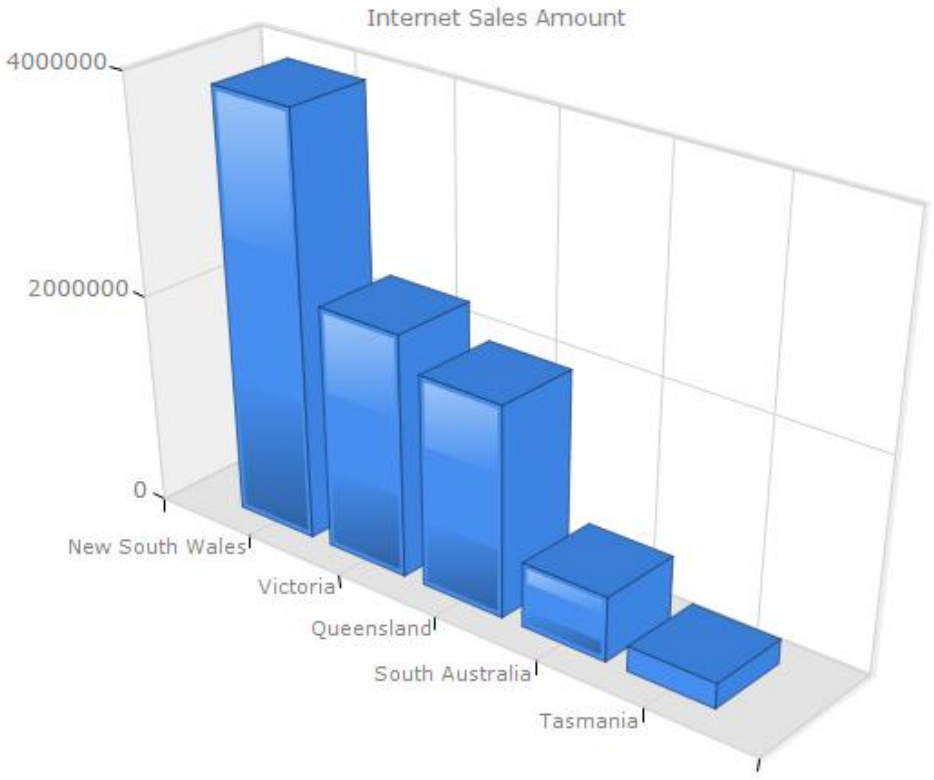


© 2011 www.kyubit.com, All rights reserved. Errors and omissions expected

3.8. Drill down and up

To gain interactivity with OLAP chart data, each shown member (that belongs to dimension hierarchy) could be selected to drill down (to hierarchy level below) or drill up (to hierarchy level above). On this way with only few clicks user gets insight in amounts distribution on each hierarchy level for a given analysis.

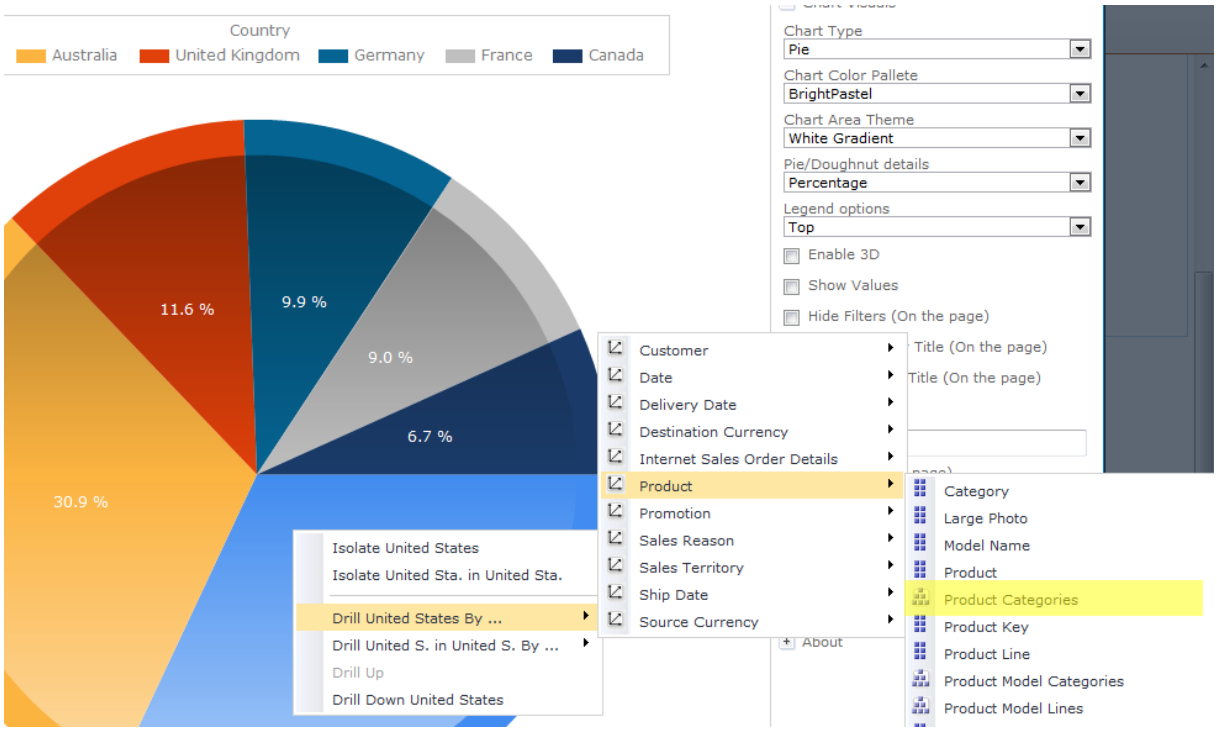


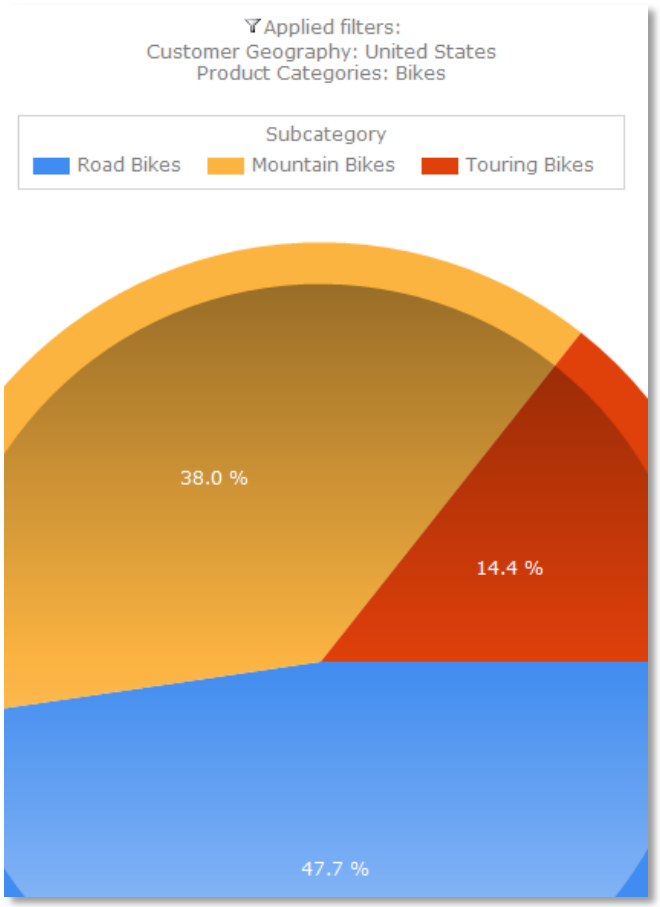


© 2011 www.kyubit.com, All rights reserved. Errors and omissions expected

3.9. Drill by

Most frequently used technique (feature) while analyzing OLAP cube data is “Drill by” functionality. Each shown member in OLAP chart, could be further analyzed by some other dimension level and get insight how amount of certain member is distributed/divided over some other available cube dimension level.

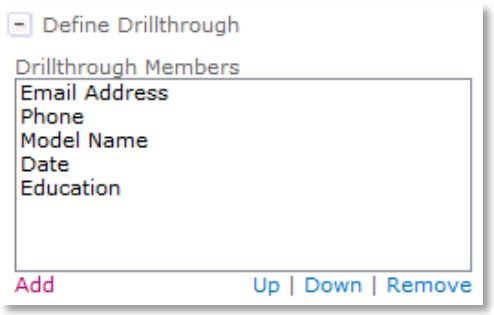


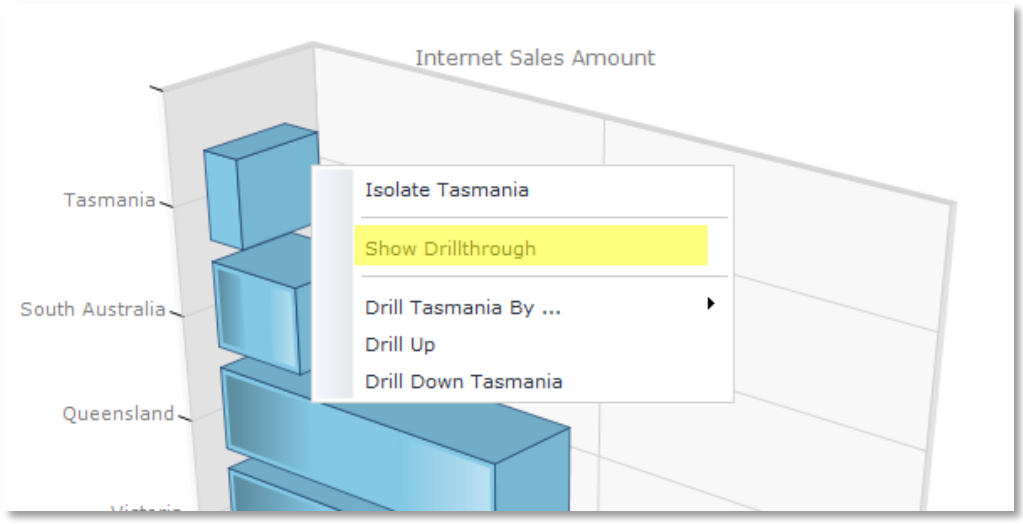


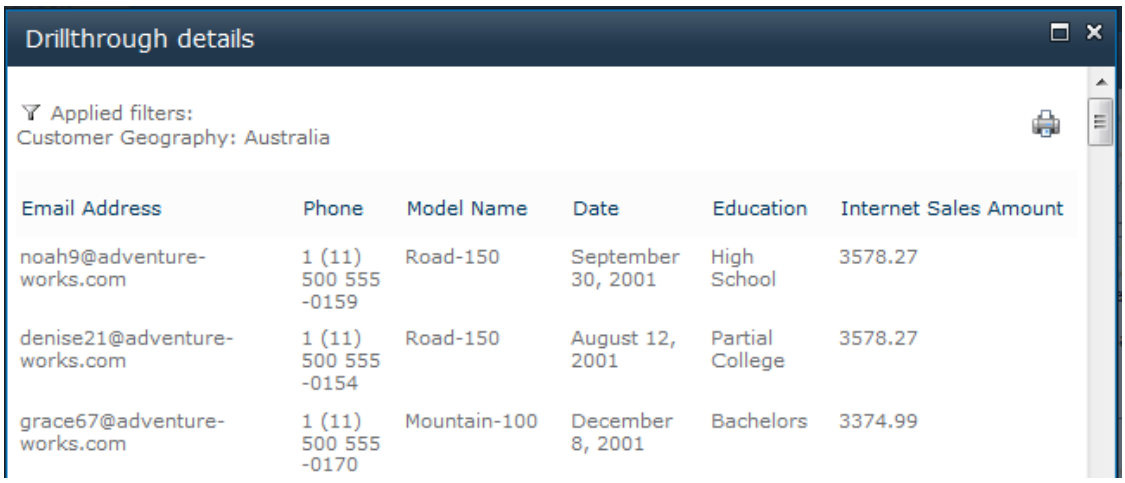
© 2011 www.kyubit.com, All rights reserved. Errors and omissions expected

3.10. Drillthrough

OLAP chart analysis shows aggregated amounts for given dimension levels. At certain moment users would like to see details within shown aggregations. For that purpose, drillthrough query could be executed. To perform drillthrough, drillthrough columns should be selected first. Each dimension level could be selected as drillthrough column for which detailed data should be visible in drillthrough query results.







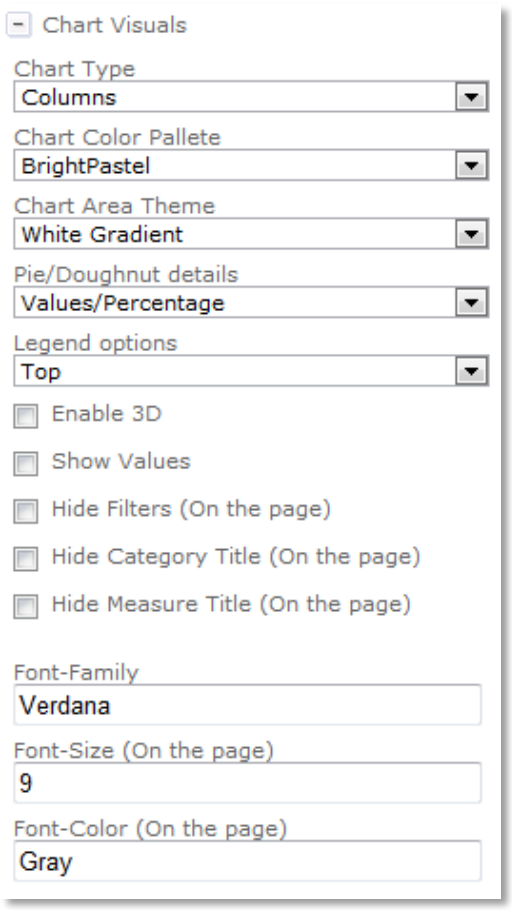
© 2011 www.kyubit.com, All rights reserved. Errors and omissions expected

4. Chart visual appearance

To find most appropriate (desired) look of analysis chart for your needs, there are available visual options which user can chose while in analysis mode (view).

- Chart Types (Column chart, bar chart, pie chart, doughnut chart ...)
- Chart color pallete (Color of chart elements)
- Chart theme (Chart background color)
- 2D/3D chart view
- Show/Hide Values (Numbers on the chart)
- Legend position (options to display legend)
- Height and with (web part design mode)
- Font
- Font size
- Font color
- Show/Hide selected filters (on the underlying SharePoint page)
- Show/Hide measure title (on the underlying SharePoint page)
- Show/Hide category title (on the underlying SharePoint page)
- Pie/doughnut display options

Any visual element could be changed while analyzing data and be previewed on underlying SharePoint page. Combining above visual elements user creates desired chart visual outlook to integrate chart into existing design of the SharePoint page.

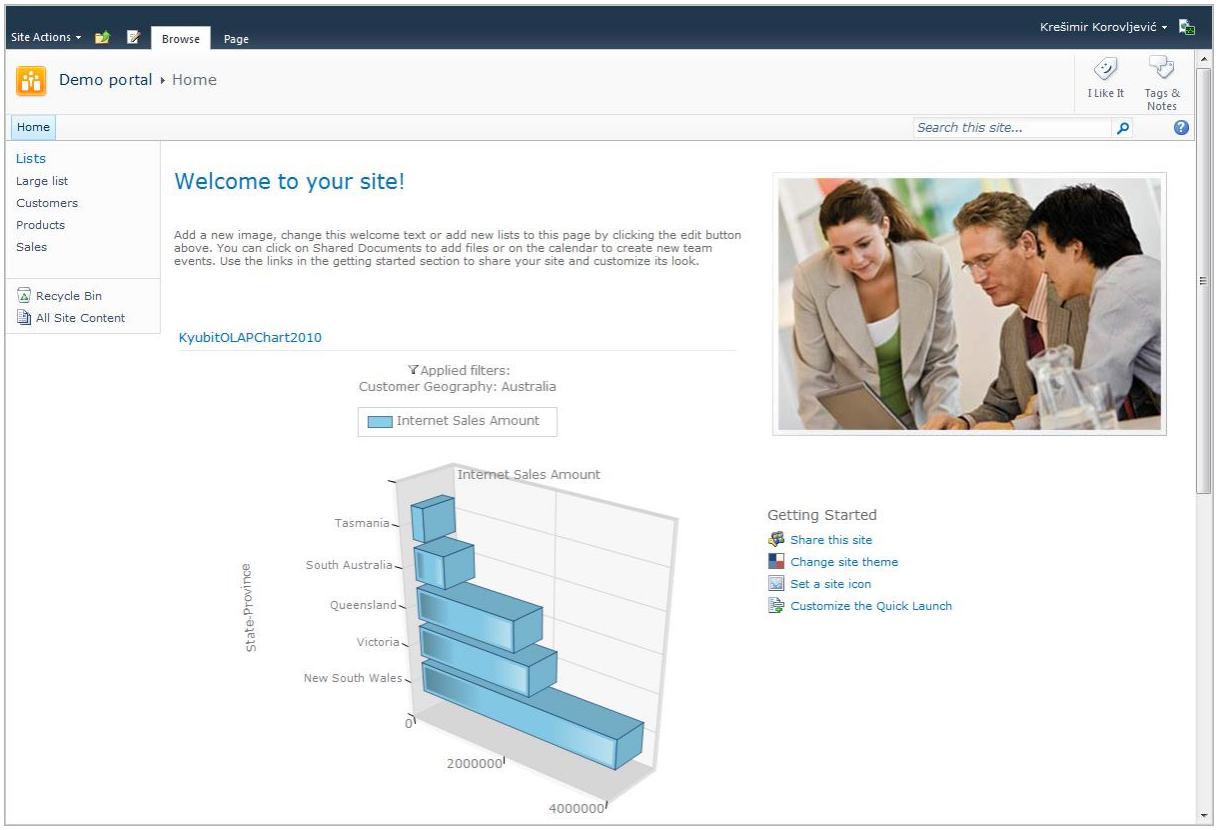


© 2011 www.kyubit.com, All rights reserved. Errors and omissions expected

5. Preview, save and continue analysis

5.1. Preview on the page

To see how OLAP chart looks on the SharePoint page bellow, users does not have to save analysis, but only to select preview of the chart on the page, to see how it fits visually to current SharePoint page layout.



5.2. Save analysis

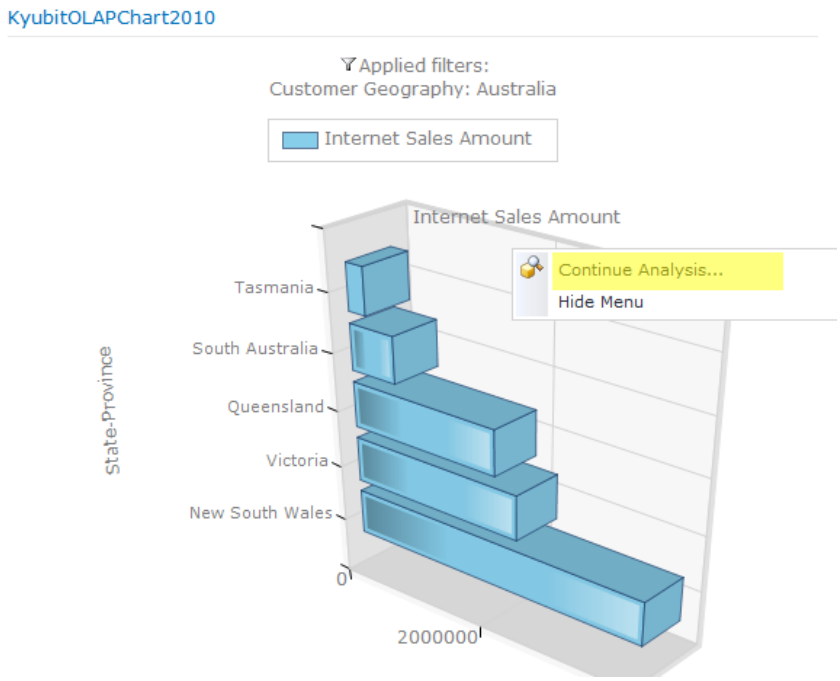
At any point while analyzing and charting your OLAP data, analysis could be saved directly from analysis view without need to go to web part design view. From that moment saved analysis (chart) will be shown on related SharePoint page. To change width and height of the web part, user has to enter page design mode and set appropriate dimensions directly on the web part.

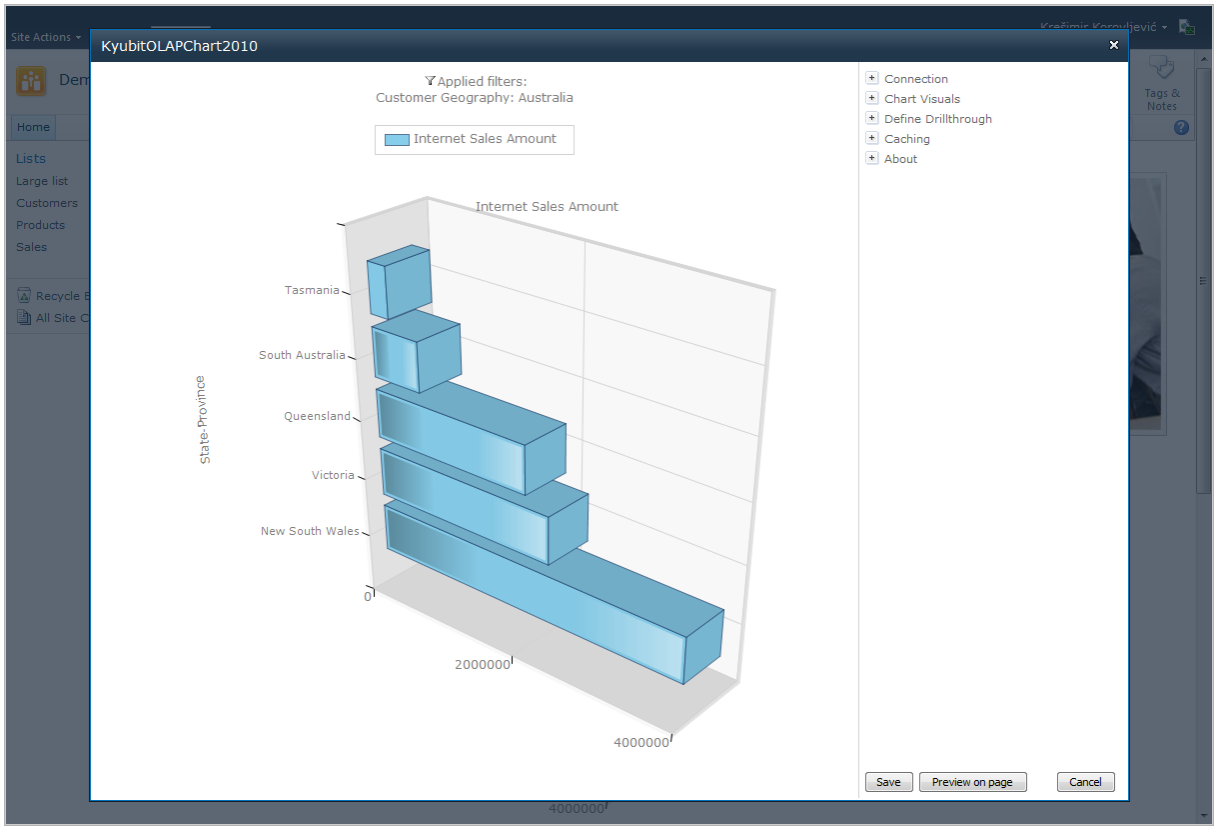
© 2011 www.kyubit.com, All rights reserved. Errors and omissions expected

5.3. Continue Analysis

Any user with OLAP data read permissions has option to click on the OLAP chart on SharePoint page and select to continue analysis from the point saved on the SharePoint page.

User does not need to have web part edit permission in SharePoint to continue analysis. If user does not have SharePoint web part editing permission for the page on which OLAP chart exists, user will not be able to save his/hers analysis work, but there are no restrictions to perform OLAP analysis itself.





© 2011 www.kyubit.com, All rights reserved. Errors and omissions expected

6. FAQ

6.1. Licensing

Question: Is it necessary to obtain license for each user (per user) that connects to OLAPChart web part?

Answer: No, only one OLAPCharts license (Site, Site Collection or Server license) is required for one OLAPCharts installation. There is no licensing (or any other) limitation in number of users that connects to application.

Question: Is it necessary to obtain additional licenses for each server CPU?

Answer: No, one license (Site, Site Collection or Server license) is required regardless of server CPU number.

Question: Is my license bound to hardware and what to do in case of hardware upgrade or replacement?

Answer: License is bound only to server domainname\servername, Site Collection ID or Site ID (depending on chosen license type), which is provided in the procedure of license purchase. OLAPCharts could be reinstalled on completely new environment as still use the same license as long as it has the domainname\servername, Site Collection ID or Site ID (depending on chosen license type) for which the license is purchased for.

Question: Is it necessary to obtain different license type (Software assurance) to have right to use future versions of AnalysisPortal?

Answer: No, once purchased license for OLAPCharts gives user right to download and use any future version of OLAPCharts software.

6.2. Installation (FAQ)

Question: What are prerequisites to install AnalysisPortal software?

Answer: SharePoint 2010 Server or SharePoint 2010 Foundation

Question: How to install OLAPCharts?

Answer: Kyubit provides Setup.exe which will guide user to install OLAPCharts SharePoint solution (wsp) to chosen Site Collection. SharePoint solution (wsp) could be also installed manually, but if for any reason you wish to do so, please consult with our support team (support@kyubit.com) to see what additional actions you have to take in that case. Setup.exe has also functionalities to apply purchased license file.

© 2011 www.kyubit.com, All rights reserved. Errors and omissions expected

6.3. Using OLAPCharts for SharePoint (FAQ)

Question: What analysis scenarios/actions OLAPCharts for SharePoint supports?

Answer: Support actions are drill down, drill up, drill by, drillthrough, isolation, filtering. User selects OLAP cube dimension (hierarchy) for Category and Series axis, measure that would be used and dimensions hierarchies that would be used for filtering (slicing).

Question: How to visually integrate OLAPCharts web part in visually customized SharePoint environment?

Answer: OLAPCharts has options to fine tune visual appearance by selecting chart type, color pallete, font, font-size, font family and other visual elements. OLAPCharts supports very small charts and large chart scenarios.

Question: Is it possible to analyze different OLAP data sources other than MS SQL Server Analysis Services?

Answer: No, OLAPCharts is designed to work with MS SQL Server Analysis services 2005/2008 and any future MS SQL Server Analysis services releases.

Question: Is there possibility to use OLAPChart on MOSS 2007?

Answer: No, OLAPCharts is designed to work only with SharePoint 2010 Foundation or Server version.

© 2011 www.kyubit.com, All rights reserved. Errors and omissions expected